

WORD 2007 FOR POWER USERS

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In this session, you'll learn how to:

- Save and email a document as a PDF
- Mark documents as final so they can't be accidentally edited
- Use the Document Inspector
- Change styles to quickly reformat documents
- Create QuickStyles and style sets to enforce custom formatting
- Create a table of contents in three easy steps
- Use and create building blocks
- Restrict formatting on part or all of a document to control look and feel
- Insert cover pages
- Illustrate your report with SmartArt
- Create custom headers and footers
- Use drop caps to add a professional look to reports
- Create and use QuickParts
- Add a signature line to a document
- Use the new Equation Editor
- Create watermarks and other background features
- Build and use a library of sources for document reference
- Insert citations and create bibliographies in various styles
- Create a form using the new Word 2007 form controls
- Digitally sign a document
- Blog directly from Word

WHAT'S NEW IN WORD – THE 10,000 FOOT VIEW

When most Word 2003 users take their first look at Word 2007, they focus on the new user interface: the “ribbon”. Don't get stuck on the ribbon. The power boost in Word 2007 isn't on the ribbon – it's in your work style, and how well you integrate these three features:

Themes – used to control most aspects of document “look and feel”, these settings for colors, fonts, and effects are shared with all the Office applications.

Styles – replace manual formatting (with the Font group) with styles to increase document reuse and make reformatting much, much easier. If you work in a collaborative environment and don't use styles, you're probably creating extra work for other people.

Building Blocks – you don't need to copy and paste headers, footers, cover pages, and other formatting features between documents. Save your custom content in a building block gallery for reuse.

NEW FEATURES ON THE OFFICE MENU

Save as PDF/XPS – Click the Office button then choose Save As PDF or XPS. If this option does not appear on the Save As menu you need to download and install this feature. Google [Microsoft Save as PDF](#) to locate the download file.

Mark as Final – This feature prevents you from accidentally modifying the final version of a document. Choose Office > Prepare > Mark as Final. If you need to edit the document later, make the same choices to turn off Mark as Final.

Document Inspector – Use the Document Inspector to identify comments, versions, custom XML data, and other items that you might want to remove before sharing the document outside your organization. Office > Prepare > Inspect Document.

UNDERSTANDING STYLES AND HEADINGS

Each version of Word since Word 2000 has relied more heavily on styles: specifications for text formatting. There are built-in styles: Normal for body text, Title for the title of a report, Heading 1, 2, 3, and so on for the sections and subsections of a report. Word 2007 introduces Style Sets, which are groups of styles saved together.

If you don't use styles, it's time to start. Tables of Contents, web publishing, and other features rely on heading styles.

APPLYING STYLES

To apply a style, select the text you wish to format then choose the Style you wish to apply from the Styles gallery on the Home tab.

TIP: To select all the text in a document that is formatted the same, select one section of text, then right click. Choose Styles then Select Text With Similar Formatting.

To switch style sets, choose Change Styles then choose Style Set. (To preview the style set, simply point to the style set and note the changes in your document.)

EDITING AND CREATING STYLES

Here's the easy way to change an existing style:

1. Format some text the way you would like it to appear in the style. Select the formatted text.
2. In the Styles gallery, right click the style you want to edit.
3. Choose Update to Match Selection.

And the fast way to create a new style:

1. Format some text the way you would like it to appear in the new style. Select the text.
2. Click the down arrow at the right end of the Styles gallery.
3. Choose Save Selection As a New Quick Style.
4. Enter a name for the style. Click OK.

CLEARING EXISTING FORMATTING

To clear formatting from a selection of text, click the right arrow in the Styles gallery and choose Remove Formatting.

TIP: To select all the text in a document, hold Ctrl and press A.

CREATING MULTI-LEVEL LISTS (OUTLINING)

You can use a multilevel list style from the gallery, or create your own list style. You can mix numbers and bullets in the same list.

To use a list from the gallery:

1. Click where you want to begin your list.
2. On the Home tab, in the Paragraph group, click the arrow next to Multilevel List.
3. Click a multilevel list style in the gallery of styles.
4. Type your list. Press the TAB key or SHIFT+TAB to change levels.

To create a new multilevel list style and add it to the gallery:

1. On the Home tab, in the Paragraph group, click the arrow next to Multilevel List.
2. Click Define New Multilevel List.
3. Beginning with level 1, enter your number format, font, and position choices.
4. Continue to define each level that you want to use in your multilevel list.
5. Click OK.

Note: To move a multilevel item to a different numbering level, select the item, click the arrow next to Bullets or Numbering in the Paragraph group on the Home tab, point to Change List Level, and then click the list level to which you want to move the list item

PAGE FORMATTING IN WORD 2007

Click the Page Layout tab on the ribbon to view or modify the document's theme, set margins, change page orientation, use columns, add watermarks, borders, page colors – anything that's applied to the entire page (or entire document).

INSERTING PAGE AND SECTION BREAKS

To insert a manual page break, click where you want the page to break, then hold Ctrl and press Enter.

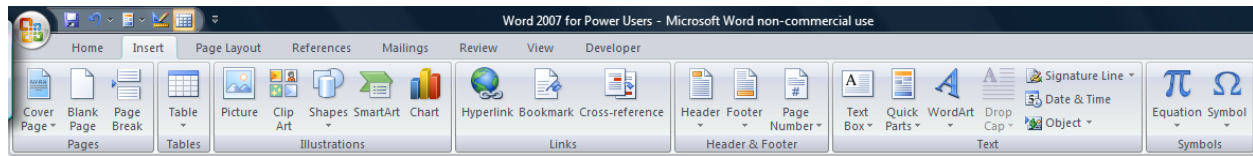
To insert a page break and a blank page, on the Insert tab of the ribbon in the Pages group choose Blank Page.

A default Word document includes one section. Page setup options (for example, portrait vs. landscape) are applied to sections of a document, so if you want to have different page numbering styles, page orientation, or other changes in page formatting, you need to add a section. To insert a section break:

Position the insertion point where you want the break to go. On the Page Layout Tab, in the Page Setup group, click Breaks. Choose the type of Section Break you want to insert.

INSERTING EVERYTHING

Think of your document this way: text (including body text and headings) and stuff you can insert. From pictures and SmartArt to tables, headers and footers, everything that's not regular text is on the Insert ribbon.



When you insert many of the items from this ribbon, a Tools tab opens at the right end of the ribbon. Some of the tools are displayed on multiple tabs.

INSERTING A COVER PAGE

Choose a Cover Page from the gallery on the Insert Ribbon. The page will be added to the beginning of the document.

INSERTING A TABLE

Position your cursor then click the Tables down arrow and choose the number of columns and rows. The Table Tools tab automatically appears above the right end of the ribbon. Note that there are two new ribbon tabs: Design and Layout.

ADDING PAGE NUMBERS

To add page numbering to your document, click the Insert tab then choose Page Number in the Header & Footer group to choose a position for page numbers. Choose Format Page Number to change the appearance of the numbering.

CREATING HEADERS AND FOOTERS

To add a header or footer (that can also include a page number) click the Insert tab then choose Header or Footer Header & Footer group. Choose a header or footer. The header or footer will be added, and available for editing. When you have finished editing the header or footer, click the Close Header & Footer button at the right end of the ribbon.

You can switch to the Home tab to format the header or footer text. When you are finished, click the Header & Footer Tools tab above the ribbon, then click the Close Header & Footer button.

To delete a header or footer, double click in the header or footer to display the Header & Footer Tools tab. In the header gallery or footer gallery choose Remove Header or Remove Footer.

SAVING QUICK PARTS

Quick Parts are pieces of formatted text you want to reuse: a signature block, for example. Create and format your text then hold Alt+F3. Save the text in the Quick Parts gallery in the Text group on the Insert tab.

REFERENCES

Footnotes, endnotes, and tables aren't just for academic documents. References add authority to any type of document.

GENERATING A TABLE OF CONTENTS

Tables of Contents rely on your use of heading styles. Before creating a table of contents, make sure that you are using Heading 1 for the highest level in the table of contents, Heading 2 for the next level, and so on. A quick way to check your use of heading styles is to right click the Heading style in the Styles gallery, then choose Select All n Instances.

With your heading styles all applied, follow these steps to create a Table of Contents:

1. Click in your document where you want to insert the Table of Contents.
2. Click the References tab. In the Table of Contents group, click Table of Contents.
3. Choose the style of Table of Contents you wish to insert, or choose Insert Table of Contents to specify formatting including tab leaders and page numbers.

After you've edited your document, page numbers and headings may change. To update your Table of Contents right click in the table and choose Update Field, or choose Update Table from the Table of Contents group on the References tab.

INSERTING FOOTNOTES AND ENDNOTES

The References tab includes tools for Footnotes, Endnotes, Citations, Bibliographies, Indexes, and four types of tables.

To insert a footnote or endnote:

1. Position the insertion point where you want the footnote or endnote reference to appear – usually at the end of the text you're noting¹.
2. On the References tab in the Footnotes group, click Insert Footnote or Insert Endnote.
3. Enter the text for your footnote or endnote, then click back in the document and continue typing your text.

CREATING TABLES OF FIGURES, TABLES, EQUATIONS

The Table of Contents relies on Styles. Tables of Figures, Tables of Authorities, and Indexes require more than heading styles – you must insert references to mark the text you want to include in your table.

You can insert three different types of tables of figures: tables, figures, and equations. Each type uses a different caption. To insert a caption:

1. Select the figure, equation, or table that you want to reference.
2. On the References tab in the Captions group, click Insert Caption to open the Insert Caption dialog box.

¹ For example....

3. Choose a Label (Figure, Table, Equation) and position for the caption. Enter any other text that you want in the label after the text provided.
4. Click OK.

With your captions in place, you create a Table of Figures, Equations, or Tables just like you create a Table of Contents.

1. Click where you want to insert the reference table.
2. On the References tab in the Captions group, click Insert Table of Figures.
3. In the General section of the Insert Table dialog box, choose the appropriate label for the type of table you're creating.
4. Click OK.

INSERTING CITATIONS

Citations are a great new feature in Word 2007. You can enter and manage sources in a central library of sources so that they can be used in other documents. Sources used in a document are automatically available to be used in the document's Bibliography.

To create a new source and cite it in your document, position your insertion point. On the Reference tab in the Citations & Bibliography group, choose Insert Citation then Add New Source to open the New Source dialog box. Enter the information for this source then click OK.

To use an existing source for a citation, click Insert Citation then choose the source from the drop down list of sources.

To add a source from the library of sources, click Manage Sources. Select the source you wish to use from the Master List then click the Copy button to copy it to your document. The source will now appear on the drop down list on the Insert Citation button in the Citations & References group.

CREATING A BIBLIOGRAPHY

To insert a Bibliography:

1. Click where you want the bibliography to appear.
2. On the References tab, in the Citations & Bibliography group, click the Bibliography down arrow.
3. Choose one of the built-in Bibliography styles, or choose Insert Bibliography to specify formatting.

CREATING AN INDEX OR TABLE OF AUTHORITIES

Indexes and Tables of Authority work the same way. Select the text you want to include in the Index or Table then click the Mark Entry or Mark Citation button on the References tab. When you're ready to generate the table, position your insertion point and choose Insert Index or Insert Table of Authorities from the References tab.

INSERTING A DROP CAP

Drop caps are decorative elements used for the first paragraph in a chapter or section. Click anywhere in the paragraph then choose In Margin or Dropped from the Drop Cap drop down list in the Text group. Looks cool, yes?

INSERTING SYMBOLS AND EQUATIONS

To insert a symbol, click the down arrow on Symbol in the Symbols group. Frequently used symbols appear on the drop down list. Click More Symbols to open the familiar dialog box.

If you've used the Equation Editor in previous versions, you're going to love the new editor, which allows you to save your frequently used equations. Click the Equation drop down to insert a built-in equation or create your own.

MAILINGS

The Envelopes and Labels features are unchanged from Office 2003.

If you know mail merge in Word 2003, you know it in Word 2007. Click the Mailings tab, click the down arrow on Start Mail Merge, and select Step By Step Mail Merge Wizard. As you go through your first mail merge, note that the steps in the wizard are the same steps that you see in the Mailings ribbon. Next time, feel free to try the ribbon, working from left to right.

TRACKING CHANGES

To collaborate with others on a Word document, you start by turning on tracking, then sharing the document with other users. You can review all changes, or each user's changes, and accept or reject changes.

To track changes:

1. Open the document that you want to revise.
2. On the Review tab, in the Tracking group, click the Track Changes image.
3. To add a track changes indicator to the status bar, right-click the status bar and click Track Changes. Click the Track Changes indicator on the status bar to turn track changes on or off.
4. Edit the document.

By default, the markup is shown in balloons in the margins. You can view all changes, including deletions, inline instead of inside balloons that appear in the margins of your document. To show changes inline, in the Tracking group, click Balloons, and then click Show all revisions inline. When you

click Show all revisions inline, all of the revisions and comments in the document appear inline. To highlight the margin area where all balloons appear, click Markup Area Highlight under Show Markup

To turn off tracking:

On the Review tab, in the Tracking group, click the Track Changes button.

To review tracked changes:

1. On the Review tab, in the Changes group, click Next or Previous.
2. For each change, do one of the following:
 - In the Changes group, click Accept.
 - In the Changes group, click Reject.
 - In the Comments group, click Delete.
3. Accept or reject changes and delete comments until there are no more tracked changes or comments in your document.
4. To ensure all tracked changes are accepted or rejected and that all comments are deleted, on the Review tab, in the Tracking group, click Reviewing Pane. The summary section at the top of the Reviewing Pane displays the exact number of tracked changes and comments that remain in your document.

CREATING FORMS AND MACROS

There's a Developer tab, hidden by default, with all the tools you need to create forms and work with macros in Word 2007. To turn on the tab, follow these steps:

1. Click the Office button
2. Click the Word Options button
3. In the Popular category, enable the Show the Developer tab in the ribbon checkbox.

CREATING FORMS

Word 2007 has great new XML form controls. If you're creating a form that will only be used by Word 2007 users, you can use these controls. If, however, you're creating a form for Office 2003 users, you cannot use these controls. If you're creating a form for users of older versions of Word, begin by saving your document in compatibility mode, which will turn off the Word 2007 controls.

PROTECTING FORMS AND DOCUMENTS

On the Developer tab, click the Protect Document down arrow and choose Restrict Formatting and Editing to open the task pane. Here, you can:

1. Limit the styles used in a document, which is a great way to enforce formatting in submissions for a document that you'll be assembling.
2. Restrict editing to form fields only, or create a document that's part read only and part editable by choosing No change. (No changes uses sections, so put continuous section breaks before and after editable sections of your document).
3. Turn enforcement on or off.

CREATE CUSTOM OFFICE THEMES IN POWERPOINT 2007

You can create themes in Word, but we recommend creating themes in PowerPoint, where you'll have easy access to all the design elements.

UNDERSTANDING THEMES

Themes are combinations of theme colors, theme fonts, and theme effects. Themes replace part of the functionality of the design templates used in earlier versions of PowerPoint. PowerPoint themes are shared with Word 2007, Excel 2007, and other Office programs to give your Office documents a uniform look.

APPLYING A THEME

On the Design tab, in the Themes group, choose More, then:

- To apply a built-in theme, under Built-In, click the theme that you want.
- To apply a newly-created theme or an existing theme that you modified and saved, under Custom, click the theme that you want. (Custom is available only if you created a custom theme.)

CUSTOMIZING A THEME

You can create your own themes by customizing an existing theme and then saving it. To customize a theme, start by changing the colors, the fonts, or the line and fill effects that are used. With all your changes made, save the changes as a theme (.thmx).

CUSTOMIZING THEME COLORS

Theme colors contain four text and background colors, six accent colors, and two hyperlink colors. The colors in the Theme Colors button are the current text and background colors, and the set of colors next to the Theme Colors name after you click the Theme Colors button are the accent and hyperlink colors for that theme. To customize theme colors:

1. On the Design tab, in the Themes group, click Colors.
2. Click Create New Theme Colors.
3. Under Theme colors, click the button next to the name of the theme color element that you want to change.
4. Under Theme Colors, click the color that you want to use.
5. Repeat steps 3 and 4 for all of the theme color elements that you want to change.
6. In the Name box, type an appropriate name for the new theme colors, and then click Save.

TIP: If you change your mind and want to discard your changes, click Reset before you click Save.

CUSTOMIZING THEME FONTS

Theme fonts contain a heading font and a body text font. When you click the Theme Fonts button , you see the name of the heading and body text fonts used for each theme font below the Theme Fonts name. You can change both of these fonts to create your own set of theme fonts:

1. On the Design tab, in the Themes group, click Theme Fonts.
2. Click Create New Theme Fonts.
3. In the Heading font and Body font boxes, select the fonts that you want to use.
4. In the Name box, type an appropriate name for the new theme fonts, and then click Save.

CHOOSING THEME EFFECTS

Theme effects are sets of lines and fill effects. When you click the Theme Effects button , you see the lines and fill effects used for each set of theme effects in the graphic displayed with the Theme Effects name. Although you cannot create your own set of theme effects, you can choose the one that you want to use in your own document theme. Follow these steps:

1. On the Design tab, in the Themes group, click Theme Effects.
2. Click the effect that you want to use.

SAVING A THEME

You can save any changes that you make to the colors, fonts, or line and fill effects of a theme as a new custom theme that you can apply to other documents or presentations. Follow these steps:

1. On the Design tab, in the Themes group, click More.
2. Click Save Current Theme.
3. In the File Name box, type an appropriate name for the theme, and then click Save.
4. The custom theme is saved in the Document Themes folder as a .thmx file and is automatically added to the list of custom themes.

